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ABSTRACT

This curriculum guide contains the materials required to teach 16 workplace basic skills courses for bank employees. The guide begins with an overview of the project during which the courses were developed through a partnership between First Chicago/NBD and a training provider and used to provide training to 1,699 participants. Presented next is a curriculum overview that explains how the 16 competency-based courses were developed to teach actual workplace tasks in the context of the work environment by using work-related instructional materials. The remainder of the document consists of course overviews and curriculum excerpts for the courses, which range in length from 1 to 10.5 hours and cover the following topics: listing from the written amount; new hire reading; new hire math; problem solving and decision making; writing log entries; business writing; performance appraisal writing; reading outlines for success; charts and tables; math for check filing; automated teller machine balancing; place value; telephone usage, mail investigation, and mail sorting; unlocking lockboxes; participating in the performance management process; and evaluating employees' performance. The following are provided for each course: lesson plan listing the course's audience, goal, and competencies taught; student handout, learning activities, and assessment instrument. (MN)

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FIRST CHICAGO/NBD

Workplace Education Division of
THE CENTER – RESOURCES FOR EDUCATION

WORKPLACE BASIC SKILLS CURRICULUM for the FINANCIAL SERVICES INDUSTRY

Grant # V198A 40238-95

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CE 077 524

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WORKPLACE BASIC SKILLS CURRICULUM

for the

FINANCIAL SERVICES INDUSTRY

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Project Overview

First Chicago/NBD (FCNBD) was awarded a three year grant from the U.S. Department of Education in 1995. FCNBD created a partnership with the Workplace Education Division of The Center – Resources for Education to design and implement a basic skills training program. The major activities of this project were to analyze the basic skill needs of the nonexempt workforce, develop customized assessments and curriculum, and provide training.

The project operated from November 1, 1995 through April 30, 1998. During that time the following services were provided:

Needs Analysis

Conducted basic skills needs analyses for Vault Services, Help Desk, Demand Deposit Accounts, Research and Adjustments, Money Transfers, Disbursement Services, and the Corporate Mail Center.

Curriculum

Developed training materials specific to the basic skill requirements at FCNBD. The titles are:

Listing From The Written Amount
New Hire Reading and New Hire Math
Problem-Solving and Decision-Making
HELP Desk Project
Business Writing
Performance Appraisal Writing
Reading Outlines for Success
Reading Charts and Tables
Math For Check Filing
ATM Balancing
Place Value
What's Your Message?
Unlocking Lockbox
How Are We Performing? and How Are They Performing?

Training:

Provided courses ranging from eight to thirty-six hours. Unde this grant, The Center:

- Offered 197 courses
- Provided 1,612 training hours with a total of 2,106 class slots
- Trained 1,699 participants.

Curriculum Overview

The goal of the customized curriculum development and training was to enhance the non-exempt employees' basic skills which would result in improved job performance and increased productivity. With this goal in mind, the curriculum developers followed these principles as they designed the curriculum:

1: The curriculum outcomes and content should be based on the results of basic skills needs analyses.

Needs analysis (also called literacy audits) identified the required level of basic skills for certain job tasks. This analysis was accomplished by: 1) interviewing worker, supervisors, and managers to determine their perception of the skills needed; 2) observing the workers perform the job; listing the tasks; recording each time the worker reads, writes or performs math; and noting the setting and people with whom the worker interacts; and 3) collecting and analyzing all job-related materials – memos, manuals, signs, forms, etc. and 4) and summarizing the needed skills. This summary of skills became the curriculum content and course outcomes.

2: The curriculum should use a competency-based approach.

Competency-based education (CBE) in a workplace context is a performance-based process leading to a demonstrated mastery of basic skills necessary for the individual to function proficiently in the workplace. The instructional content focuses on the learning and applying of basic skills to the workplace as determined by an assessment of the learner's needs, goals, and abilities. A competency-based approach offers:

1) a framework for instruction that is consistent with accepted curriculum development practices and adult learning theory, which states that learning is more rapid when instruction is relevant and immediately applicable to the learner's daily life,
2) a built-in means of customized pre and post evaluation, and
3) a basis for program accountability.

3: The curriculum should use a functional context.

The functional-context curriculum ensures that all skills are taught in the context of the work environment, and the success of the learning is demonstrated by the application of those skills in the workplace.

4: The curriculum should be customized and incorporate work-related instructional materials.

The curriculum for each department was customized to incorporate the actual workplace materials. It is important to note that many of these workplace materials contained sensitive, confidential information and were deemed proprietary in nature. This, in turn, affected potential for dissemination of materials outside the training room.

5: Instructional materials and activities should mirror the workplace tasks.

The "working style" of the workplace was primarily kinesthetic in that workers spent most of their work time sorting, filing, referencing and manipulating materials such as checks, outlines, mail, and support materials. Therefore, many of the instructional materials were manipulatives instead of pen-and-paper activities. For example, arranging names by alphabetical order was practiced by sorting a collection of envelopes rather than a written worksheet in which learners would sequence a list of names by writing "1," "2," etc., for the alphabetical order.

The curriculum development process was a team approach involving both Center and FCNBD staff, such as the Project Director, department supervisors/managers, and trainers. Courses were offered repeatedly to a large number of workers, therefore, it was critical that the curriculum be valid, instructionally sound, and consistent. The development steps had a built-in means for "checks and balances" in that there were various checkpoints in which all staff evaluated the materials for accuracy of content as well as sound adult educational principles.

The curriculum development phases are outlined on the next page.

NEEDS ANALYSIS

Center Staff		FCNBD Staff
Determine basic skills needed for certain jobs.	→	Review the findings.

CURRICULUM DESIGN

Center Staff		FCNBD Staff
Identify course outcomes and course schedule.	→	Review course outcomes and schedule.
Develop the course syllabus.	→	Review the syllabus.
Develop the customized assessment.	→	Field-test assessment & provide feedback.
Develop the instructional materials.	→	Review the materials.
Edit and produce the materials.		

CURRICULUM PILOT

Center Staff		FCNBD Staff
Pilot the course using the materials.	→	Observe the training.
Evaluate the course (Assessment results, participant course evaluation forms, and participant work, and trainer input.)	↔	Evaluate the course.
Make suggestions for curriculum improvement.	↔	Make suggestions for curriculum improvement.

CURRICULUM PRODUCT

Center Staff		FCNBD Staff
Edit and produce the final copy of the curriculum.	→	Proof the curriculum. Produce participant handbooks.

ONGOING EVALUATION

Course Overviews and Curriculum Excerpts

The purpose of this section is to provide the user with course outcomes, a syllabus, and sample materials which can be used to develop similar courses for other financial institutions.

It is important to note that the curriculum was based on actual workplace documents which contain confidential and proprietary information. Therefore, it is impossible to disseminate the complete curriculum. The samples contained in this section should prove useful as templates for users to develop their own functional context curriculum specific to the needs of other financial institutions.

Course Overview:

Listing From The Written Amount

Audience:	Remittance clerks who have responsibility for proofing and processing checks
Goal:	To improve speed and accuracy in identifying two-amount checks and in processing acceptable checks
Contact Hours:	5 hours
Schedule:	1.25 hours a session for 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. Read large numbers quickly.
2. Write numbers as written amounts.
3. List written amounts as numbers.
4. Identify parts of a check.
5. Compare two amounts on checks.
6. List from checks.

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Contents

Day 1	• Welcome/Introduction • Enrollment Forms • Attendance • Practice (Listing Exercise) • Pre-Test (Batch A)
Day 2	• Practice/Warm-up (Set L) • Pre-Test Return • Listing Techniques • Practice (Set M) • Worksheets: Place Value & Written Nos. • Timed Listing Exercise (Batch B)
Day 3	• Practice/Warm-up (Set N) • Handouts: Elements of a Check & Two-Amount Checks • Timed Listing Exercise (Batch XYZ)
Day 4	• Review Questions • Post-Test (Batch A) • Course Evaluations • Certificates/Refreshments

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Name:_____

LISTING FROM THE WRITTEN AMOUNT
POST-TEST

Directions: Write each amount below in numbers. Use dollar signs and decimal points where appropriate.

1. Fifteen dollars and seven cents _____
2. Forty-six dollars and seventy-two cents _____
3. Twelve thousand dollars and three cents _____
4. Two hundred thirty-two dollars and nine cents _____
5. Five hundred forty-three thousand, four hundred twenty-two dollars and eleven cents _____
6. Eighty-one dollars and sixty-two cents _____
7. Four hundred fourteen dollars _____
8. Three million, one hundred forty-nine thousand, ten and 06/100 dollars _____
9. One thousand, eight hundred and 05/100 dollars _____
10. Five and 05/100 dollars _____
11. Thirty thousand, nineteen and 37/100 dollars _____
12. Five hundred ninety thousand, fifty-two and 60/100 dollars _____

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Directions: Write each number below in words.

1. $5.04 _____

2. 6,543 _____

3. $572.00 _____

4. $.07 _____

5. $1,004,537.22 _____

_____

6. $34.74 _____

7. 200.09 _____

8. $1,766.66 _____

_____

9. 871,200 _____

_____

10. $42,582.87 _____

_____

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Parts of a Check:
Directions: Match the 10 parts of a check listed below with the corresponding numbered area of the check.

_____ Check Number

_____ Legal Amount

_____ Memo

_____ Remitter

_____ Bank Information Field

_____ Courtesy Amount

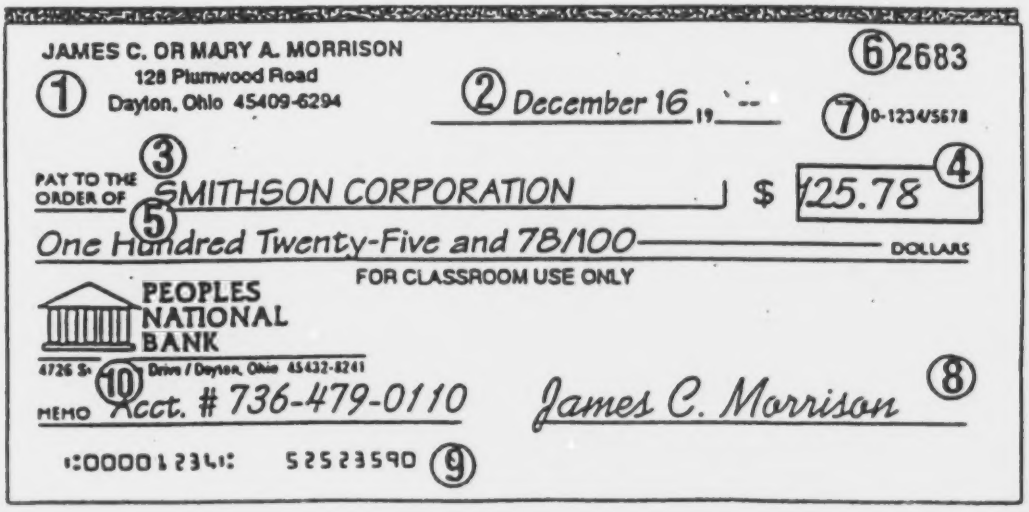
_____ Date of a Check

_____ MICR (Magnetic Ink Character Recognition) Line

_____ Payee

_____ Signature(s) of Payor(s)

Sample Check



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Directions: Complete the dollar amounts on the checks below. Write out the amount in words in the appropriate place on the check.

AaBbCcDdEeFfGgHhIiJj 12345678910
AaBbCcDdEeFfGgHhIiJj 12345678910

6139

2-1/710

_____ 19____

Pay to the Order of _____ $ 10,919.31

_____ Dollars

FIRST CHICAGO BANK
The First National Bank of Chicago
Chicago, Illinois 60670

SAMPLE-VOID

For _____

⑆071000013⑆ 12 34567⑈

THOMAS B. ANDERSON
123 MAIN STREET
ANYWHERE, USA 67890

50813

9-5678/1234

_____ 19____

Y THE ORDER OF _____ $ 464,213.08

_____ DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 36343

SAMPLE-VOID

R _____

⑈050813⑈ ⑆031000037⑆ ⑈34 567 8⑈

THOMAS B. ANDERSON
123 MAIN STREET
ANYWHERE, USA 67890

74465

9-5678/1234

_____ 19____

HE ER OF _____ $ 5,821.03

_____ DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 36343

SAMPLE-VOID

⑈074465⑈ ⑆021000089⑆ ⑈56⑉789⑉0⑈

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Directions: Complete the dollar amounts on the checks below. Write out the dollar amount using whatever punctuation is necessary. Enter the amount in the appropriate place on the check.

THOMAS B. ANDERSON
123 MAIN STREET
ANYWHERE, USA 67890

57575

9-5678/1234

_____ 19___

PAY TO THE ORDER OF _____ $ _____

Ninety-seven thousand, five hundred twenty-six dollars - 56/100 DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 38345

SAMPLE-VOID

FOR _____

⑈057575⑈ ⑆091900067⑆ 5 67 890⑈

THOMAS B. ANDERSON
123 MAIN STREET
ANYWHERE, USA 67890

45095

9-5678/1234

_____ 19___

PAY TO THE ORDER OF _____ $ _____

twelve million, four hundred two thousand, twenty-one dollars - 48/100 DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 38345

SAMPLE-VOID

FOR _____

⑈045095⑈ ⑆031000011⑆ ⑈2345⑈6⑈

THOMAS B. ANDERSON
123 MAIN STREET
ANYWHERE, USA 67890

60704

9-5678/1234

_____ 19___

PAY TO THE ORDER OF _____ $ _____

Five hundred forty-two thousand, eleven dollars - twenty-four cents DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 38345

SAMPLE-VOID

FOR _____

⑈060704⑈ ⑆051402385⑆ ⑈123456⑈

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Directions: There is no material associated with the following checks; so for the purposes of this exercise, please indicate by writing the word "GUARANTEE" if the amounts on these checks do not match and need to be guaranteed.

MUSTANG SPORTSWEAR, INC.
102-14 37TH AVE.
CORONA, NY 11368

DATE	INVOICE	AMOUNT	
1-4(2)-3638904			

1-777
260 BR. A

23824

THE SUM 4705 35

PAY _____ DOLLARS

DATE	TO THE ORDER OF	CHECK NO	GROSS PAYABLE	GROSS DIRECT	DISCOUNT	CHECK AMOUNT
1/11/93	Travelers Insurance	03824		4705 35		4705 35

MUSTANG SPORTSWEAR, INC.

STERLING NATIONAL BANK
& TRUST COMPANY OF NEW YORK
111 LEXINGTON AVENUE, NEW YORK, NY 10017

⑈023824⑈ ⑆026007773⑆ 08 061780⑈01

4662

PRO GOLF OF KALAMAZOO
4425 E. WESTNEDGE PH. 616-343-1277
KALAMAZOO, MI 49008

CO. PACK 4/15 19 93

$ 123 58

One Hundred Twenty Three 58/100 DOLLARS

OLD KENT

⑈004662⑈ ⑆072400447⑆ 0⑈147⑈1848⑈ ⑈00000123 58⑈

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LIZZI CLOTHING & CUSTOM TAILOR
879 INKSTER RD.
GARDEN CITY, MI 48135.

3480

6-7 1993

PAY TO THE ORDER OF Hart Shaffner & Marx $ 6144.00

Six Thousand Forty Four Dollars 00/100 DOLLARS

MANUFACTURERS NATIONAL BANK OF DETROIT
CHERRY HILL-INKSTER OFFICE
27300 CHERRY HILL ROAD
DEARBORN HEIGHTS, MICHIGAN 48127

FOR _____ Evelyn J. Lizzi

⑈003490⑈ ⑆072000339⑆ 10370210 78⑈

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Course Overview:

New Hire Reading

Audience:	New hires in Central Operations
Goal:	To prepare for the type of reading done on the job
Contact Hours:	6 hours
Schedule:	1.5 hours a session for 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. Read a production outline.
2. Read First Chicago product sheets.
3. Summarize facts from a product sheet.
4. Read bar and line production and quality charts.
5. Write a memo that lists key facts.
6. Listen and take notes at a staff meeting.
7. Use notes to write a summary of a staff meeting.
8. Take a phone message.
9. Skim and scan First Chicagoan.
10. Read Employee Stock Option Purchase and Savings Plan.

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NEW HIRE TRAINING: READING / WRITING
Daily Overviews

Day 1

Topic	Competencies	Trainer's Materials	Participants' Materials
1.1 Staff Meeting	• Listen and take notes at a staff meeting.	Trainer's Guide 1.1 Trainer's Script	1.1 Worksheet
1.2 Employee Materials	• Read the company newsletter.	Trainer's Guide	1.2 First Chicagoan, Sept. 1994 1.2 Worksheet #1 1.2 Worksheet #2
1.3 Employee Materials	• Summarize from a product sheet.	Trainer's Guide	1.3 Handout 1.3 Worksheet

Day 2

Topic	Competencies	Trainer's Materials	Participants' Materials
2.1 Review: First Chicago	• Skim & scan First Chicagoan.	Trainer's Guide	2.1 Most recent issue of First Chicagoan 2.1 Worksheet
2.2 Staff meeting	• Use notes to write a summary of a staff meeting.	Trainer's Guide 2.2 Trainer's Script	2.2 Worksheet 2.2 Handout
2.3 Production Outline	• Read a production outline.	Trainer's Guide	2.3 Coopers & Lybrand outline. (Handout #1) 2.3 Purina Mills Outline (Handout # 2) 2.3 Worksheet
2.4 Employee Materials	• Write a memo which lists key facts.	Trainer's Guide	2.4 Handout # 1 2.4 Handout # 2

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Day 3

Topic	Competencies	Trainer's Materials	Participants' Materials
3.1 Production Charts	• Read a bar chart.	Trainer's Guide Trsp. Basic Bar chart	3.1 Basic Bar chart Handout 3.1 Worksheet #1 3.1 Worksheet #2
3.2 Phone message	• Take a phone message.	Trainer's Guide 3.2 Trainer's Script Tape Recorder Tape	3.2 Worksheet
3.3 Employee materials	• Read the Employee Stock Option Purchase & Savings Plan.	Trainer's Guide	3.3 Employee Plan 3.3 Worksheet

Day 4

Topic	Competencies	Trainer's Materials	Participant's Materials
4.1 Review: Phone message	• Take a phone message.	Trainer's Guide 4.2 Trainer's Script Tape recorder Tape	Blank paper.
4.2 Production Charts	• Read a bar and a line chart.	Trainer's Guide	4.2 Handout 4.2 Worksheet #1 4.2 Worksheet #2 4.2 Worksheet #3
4.3 Employee Materials	• Read First Chicago product sales brochures.	Trainer's Guide	4.3 Handout # 1 4.3 Handout # 2 4.3 Handout # 3

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First Chicagoan: Skim and scan the company newsletter.

Read The First Chicagoan, Sept. 1994, and answer the following questions.

1. Who is Jerry Jurgensen? _____

2. What does APEX stand for? _____

3. How does Mr. Jurgensen define the culture of the Community Banking Group? _____

_____

4. Name three areas of the bank that will be worked on during the restoration project that is currently taking place at One First National Plaza.

_____

_____

5. When will the restoration of the plaza be completed? _____

6. Who created the mosaic "The Four Seasons" located at One First National Plaza? _____

7. Who writes "The Chairman's Corner?" _____

8. What is the purpose of the class "Traveling Through White Water?" _____

_____

9. What was First Chicago's role in the March of Dimes WalkAmerica? _____

_____

10. What are two advantages of using interoffice envelopes instead of white self-sealing envelopes? _____

_____

11. Name two methods of obtaining a copy of the publication "Working Parents at First Chicago." _____

_____

12. Which section do you think is the most important reading for a First Chicago employee? Why? _____

_____

13. Which section would you read for your own information? Why? _____

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Course Overview:

New Hire Math

Audience:	New hires in Central Operations
Goal:	To prepare for the type of math done on the job
Contact Hours:	8 hours
Schedule:	2 hours a session for 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. Read large numbers quickly.
2. Write numbers as written amounts.
3. List from checks.
4. Check a paycheck stub.
5. Complete a time sheet.
6. Identify missing amount or number.
7. Solve a proportion.
8. Verify amounts.
9. Identify parts of a check.
10. Compare two amounts on checks.

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NEW HIRE CURRICULUM: MATH

Day 1:

Materials: Checks Set A, Timer

Topic	Mins.	Competency	Core Worksheets	Additional Practice Worksheets	Challenging Practice Worksheets
Pre-test	30		PRE-TEST		
Place value	5	Write the place value of a digit Read large numbers	PL. VAL. 1.1 PL. VAL. 2.1	PL. VAL. 1.1AP PL. VAL. 2.1AP	PL. VAL. 1.1CP PL. VAL. 2.1CP
Written numbers	30	Write numbers as written amounts Write written amounts as numbers	WRITTEN NOS. 1.1 WRITTEN NOS. 2.1	WRITTEN NOS. 1.1AP WRITTEN NOS. 2.1AP	WRITTEN NOS. 1.1CP WRITTEN NOS. 1.2CP WRITTEN NOS. 2.1CP
Listing	40	List from numbers List from written amounts List from checks	LISTING 1.1 LISTING 2.1	LISTING 1.1AP LISTING 2.1AP	LISTING 1.1CP LISTING 2.1CP

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NEW HIRE CURRICULUM: MATH

Day 2:

Materials: Checks Set B, Timer

Topic	Mins.	Competency	Core Worksheets	Additional Practice Worksheets	Challenging Practice Worksheets
Review	20		REVIEW 1.1 REVIEW 1.2		
Paycheck	10	Read a paycheck stub Check a paycheck stub	PAYCHK 1.1 PAYCHK 2.1	PAYCHK 1.1AP PAYCHK 2.1AP	PAYCHK 2.1CP
Hours worked	45	Convert mins. to decimal part of an hour Compute hours worked Complete a time sheet	HRS. WRK. 1.1 HRS. WRK. 2.1 HRS. WRK. 3.1	HRS. WRK. 1.1AP HRS. WRK. 2.1AP HRS. WRK. 3.1AP	HRS. WRK. 1.1CP HRS. WRK. 2.1CP HRS. WRK. 3.1CP
Listing	30	List from checks			

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NEW HIRE CURRICULUM: MATH

Day 3:

Materials: Checks Set XYZ, Timer

Topic	Mins.	Competency	Core Worksheets	Additional Practice Worksheets	Challenging Practice Worksheets
Review	30		REVIEW 2.1		
Compare	5	Compare numbers Compare amounts and numbers Order numbers Identify missing amount or number	COMPARE 1.1 COMPARE 1.2 COMPARE 2.1 COMPARE 3.1	COMPARE 1.1AP COMPARE 1.2AP COMPARE 2.1AP COMPARE 3.1AP	COMPARE 1.1CP COMPARE 1.2CP COMPARE 2.1CP COMPARE 3.1CP
Proportion	40	Write a ratio Solve a proportion	PROPORTION 1.1 PROPORTION 2.1	PROPORTION 1.1AP PROPORTION 2.1AP	PROPORTION 1.1CP PROPORTION 2.1CP
Listing	30	List from checks			

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NEW HIRE CURRICULUM: MATH

Day 4:

Materials: Checks Set A, Timer

Topic	Mins.	Competency	Core Worksheets	Additional Practice Worksheets	Challenging Practice Worksheets
Review	30		REVIEW 3.1		
Verification of written amounts	5	Verify amounts	VER. AMT. 1.1	VER. AMT. 1.1AP	VER. AMT. 1.1CP
Elements of a check	5	Identify the parts of a check	EL. CH. 1.1		
Two amount checks	5	Compare two amounts	TWO AM. CH. 1.1		
Listing	30	List from checks			
Post-test	30		POST-TEST		

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MATH REFRESHER: Post-test

Directions: Write out the following numbers.

1) twelve thousand, four hundred five and 10/100 dollars _____

2) eight million, four thousand, forty-six and 05/100 dollars _____

3) six hundred seven thousand, eight and 99/100 dollars _____

4) one thousand, ninety-one and 00/100 dollars _____

5) nine hundred thousand, five hundred and 74/100 dollars _____

6) nineteen million, forty thousand, three and 04/100 dollars _____

7) eight hundred two thousand, twenty-two and 90/100 dollars _____

Directions: Write out the names of the following dollar amounts.

8) $40,207.20 _____

_____

9) $400,009.07 _____

_____

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10) $4,040,090.20 _____

_____

11) $440.34 _____

_____

12) $6,060.06 _____

_____

13) $200,084.29 _____

_____

14) **Circle the largest number in each group.**

32095764	8348569
32097564	8348659
32095564	8348596
32097546	8348695
32095746	8348665

15) **Write each value as a fraction.**

a) 6.25 _____

b) 4.5 _____

16) **Write each value as a decimal.**

a) 12 1/2 _____

b) 3/4 _____

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Directions: Solve the following problems.

17) John works from 10:30 until 6:15, for a rate of $7.20 per hour. He does not get paid for lunch, which he takes from 1:45 to 2:15. How much money does he make in a five-day workweek?

18) Ben makes $6.75/hour and works 40 hours per week. He is paid every two weeks, and each pay period the following deductions are made:

Federal tax:	$60.70
State tax:	$12.25
FICA:	$23.00

What is his biweekly gross pay?

What is his biweekly net pay?

19) Last month, a department processed 800,000 invoices at an error rate of 3 per 20,000. How many errors were made?

20) A series of 35 check amounts appears on a list and has a correct total of $87,455.29

Millie adds the same checks and gets a total of $87,544.29
David adds the same checks and gets a total of $87,655.67
Frieda adds the same checks and gets a total of $87,409.32

Adjust each person's tally, showing how far over or under the correct total each tally is.

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Directions: Match the 10 parts of a check listed below with the corresponding numbered area of the check.

_____ Check Number

_____ Legal Amount

_____ Memo

_____ Remitter

_____ Bank Information Field

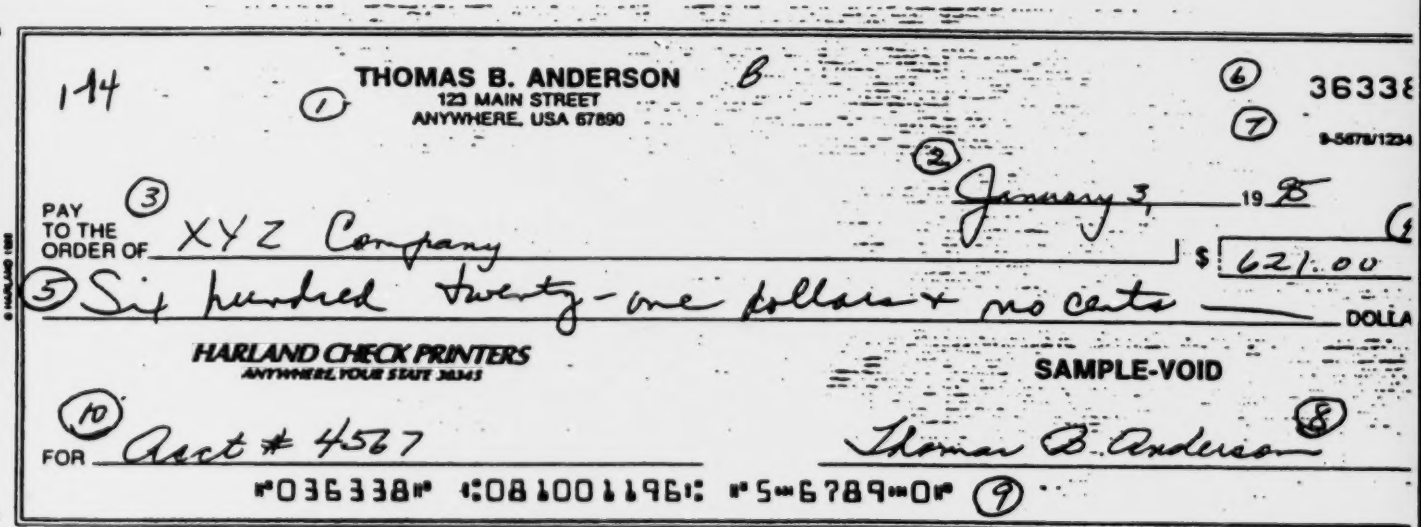
_____ Courtesy Amount

_____ Date of a Check

_____ MICR (Magnetic Ink Character Recognition) Line

_____ Payee

_____ Signature (s) of Payor (s)



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Course Overview:

Problem Solving & Decision Making

Audience:	Research and Adjustment Facsimile Unit clerks
Goal:	To enhance problem-solving and decision-making skills
Contact Hours:	36 hours
Schedule:	2 hours a session for 18 sessions
Competencies:	At the end of this course, participants will be able to:

1. Understand "problem based learning" model.
2. Ask questions to help solve a problem, make a decision, or aid understanding.
3. Systematically read and interact with Request for Research form.
4. Understand facsimile unit abbreviations.
5. Prioritize hotsheets.
6. Write a clear and effective statement of the Request for Research form about the inability to locate an item.
7. Write comments on requests on terminal.
8. Make a logical decision about what to copy when pulling checks.
9. Write a flow chart.
10. Communicate on the phone more effectively.
11. Decide when to refer a task to a team leader.

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Competency: Systematically read and interact with the Request for Research form

Pre-reading discussion

1. What is the difference between the approaches used to locate information in a phone book and those used to read a novel?
2. Which approach is more like that of reading a Request for Research form?
3. How would you explain the parts of the hotsheet to a new co-worker?

***

I. Directions: In pairs, read and answer the following questions.

1. What questions do you have about the hotsheet format in general or the information or layout of specific hotsheets?

_____

_____

2. What areas of the form need extra close attention? Why?

_____

_____

_____

_____

3. How many months of statements do you need to copy in the following ranges for accounts that cycle on these dates?

Range		# of months
From	To	
09 / 02 / 94	11 / 02 / 94	_____
08 / 02 / 92	09 / 02 / 93	_____
11 / 01 / 92	12 / 31 / 93	_____
03 / 03 / 93	04 / 03 / 93	_____

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Course Overview:

Help Desk Project

Audience:	Bank Support Specialists
Goal:	To enhance skills in writing log entries
Contact Hours:	24 hours
Schedule:	2 hours a session for 12 sessions
Competencies:	At the end of this course, participants will be able to:

1. Analyze oral communication to isolate main ideas, significant supporting details, and the definition of key terms of users' miscellaneous retail (customer support), hardware and software problems.
2. Isolate key terms of users' descriptors to select the appropriate category of the user's problem.
3. Identify the appropriate level of detail to include in the Bank Support Specialists' written response log.
4. Demonstrate improved usage of standard English grammar and punctuation in Bank Support Specialists' written response log.
5. Provide standardized replies in the written response logs of the most common types of calls received by the Help Desk.
6. Demonstrate mastery of skimming and scanning skills to effectively access information from software manuals, training documents, Bank initiatives, phone lists, and other documents to assist users in problem resolution.

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1st Chicago Corporation
1 North Dearborn
Chicago, Illinois

Help Desk Curriculum
Pre-Assessment

There are several parts to this assessment. Each part is separate and has its own instructions. Read your instructions carefully before you complete each part of the assessment.

Part One: Analyis of Bank Documents

Use the section of the training manual on the attached page entitled "Schedule of Fees" to answer the questions that follow.

1. How much will the bank charge a customer to recalculate interest?

2. What fee will you be charged to have your cancelled checks mailed to you if your First Account Plus average daily account balance is $1,987.95?

3. Where should you look to find monthly fees?

4. How will an originating bank's fees be paid on a check drawn on a foreign bank?

5. Your ATM has a Cash Station Logo and you use it at a bank not owned and operated by a First Chicago or American National Bank. How much will you be charged to make a Balance Inquiry?

6. You write five checks per month on your First Money Market account per statement period. How much will you be charged for that privilege?

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Part Two: Identify Appropriate Level of Detail:

Read the following passage from the "Action" section taken from the Help Desk log carefully. Then, in the space provided, rewrite the passage to include the level of detail you feel is appropriate. Use Standard English punctuation and grammar.

THEY PRESS THE APPLICATION ENTRY AND THE Y GET THE HOUR GLASS HOLD HER A PERIOD OF TIME THEN THE ARROW COMES BACK. PAULA WAS HAVING PROBLEMS AND WAS CALLING JOSHUA. 10:30 MARY CALLED BACK NOTHING HAS CHANGED WHAT'S UP I FOUND PAULA SHE HAS NOT CALLED JOSHUA YET. I CALLED HIM. JOSHUA SAID TO CALL NETWORK OPS HAVE THEM CHECK IT OUT. I CALLED CAC CAC TURNED IT OVER TO NOC(SAM) INFOSYS RECORD 936974. GINGER SUGGESTED I CALL DEBORAH HARMS SHE HAD DEARBORN STATION EARLIER IN THE WEEK WITH A SIMILAR PROBLEM. I CALLED DEBORAH. THE PROBLEM WAS THE SAME. THE IP ADDRESS WAS CHANGED. PARK RIDGE WAS UP AS OF 12:00. MARY WORKED WITH DEBORAH DIRECTLY. DEBORAH CALLED BACK LETTING ME KNOW WHAT THE PROBLEM WAS. THEN CALLED BACK BECAUSE SHE CANNOT FIND OUT WHY THIS IS HAPPENING. I SUGGESTED SHE SPEAK WITH BECKY L TO SEE IF ANYONE THAT WORKS FOR HER HAS DONE ANYTHING. IT SEEMS SOMEONE HAS CHANGED IT. NO UPGRADES WERE MADE TO THE SERVERS.

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Course Overview:

Business Writing

Audience:	Community Banking Group Demand Deposit Account employees
Goal:	To improve written communication skills
Contact Hours:	16 – 33 hours
Schedule:	2 –3 hours a session for 8 – 11 sessions
Competencies:	At the end of this course, participants will be able to:

1. Use grammar correctly.
2. Compare and contrast professional and informal communications.
3. Write a memo.
4. Write a business letter.
5. Write a resume.
6. Write clearly and concisely.
7. Take notes.
8. Write a report.

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COMMUNITY BANKING GROUP
DEMAND DEPOSIT ACCOUNTS
BUSINESS WRITING COURSE

Course Competency	Corresponding Skill	Course Specific Terminology	Activities	Resources/ Materials
1. Reviews usage	• Parts of speech • Structure: sentences & paragraphs • Punctuation • Using grammar references • Spelling tips	Nouns, Verbs, Adjectives, Adverbs, Pronouns, Conjunctions, Prepositions, Interjections, Capitalization, End punctuation, Comma, Semicolon, Colon, Sentence and Paragraph writing	• Reviews pre-assessment of basic business writing skills • Writes personal bank history	Customized worksheets *A Pocket Style Manual* (St. Martin's Press), a reference text *English Workout* (Macmillan/ McGraw-Hill)
2. Compares and contrasts professional and informal communications	• Friendly letter form and content • Business letter form and content	Letter parts: Return address, Inside address, Salutation, Body, Closing, Signature	• Identifies the parts of a friendly letter • Identifies the parts of a business letter • Analyzes departmental letters	Customized worksheets Company letters
3. Writes a memo	• Memos for information • Memos as reminders and updates	Memo Heading Form: To:, From:, Re: or Subject:, and Date:	• Writes a memo • Evaluates memo in groups	Customized worksheets Company memos
4. Writes a business letter	• Letter of inquiry or request • Letter of complaint	inquiry request complaint	• Reads a newsletter article • Writes an open letter to the CEO	Customized worksheets Company newsletter
5. Writes a resume	• resume	job objective experience education reference	• Writes a resume	Customized worksheets

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COMMUNITY BANKING GROUP
DEMAND DEPOSIT ACCOUNTS
BUSINESS WRITING COURSE

Course Competency	Core Basic Skill	Course Specific Terminology	Activities	Resources/ Materials
6. Writes clearly and concisely	• Writes sentences clearly • Writes sentences concisely • Summarizes an article	clarity conciseness	• Does sentence writing exercises • Reads "The Chairman's Corner" (May, 1995) • Writes a summary	Customized worksheets
7. Reviews note-taking skills	• Writes notes from oral instructions • Writes notes while reading • Improves memory	study skills	• Role-plays taking notes about telephone messages, directions, procedures, and meetings • Practices (in groups of two) taking notes about a project	Customized worksheets
8. Writes a report	• Writes a short report • Writes a long report	purpose audience	• Write a short report about a process • Writes a long report about a problem and its solution	Customized worksheets Department reports

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COMMUNITY BANKING GROUP
DEMAND DEPOSIT ACCOUNTS SERVICES

BUSINESS WRITING POST ASSESSMENT

PART 1: Read the following sentences. Then, on the line in front of each number, write "C" for "Correct" or "I" for "Incorrect."

_____ 1. Coming down the hall, the check sorting department could be seen on the left.

_____ 2. After the training class was over, everyone stayed to discuss their ideas.

_____ 3. Since it was after 2:00 P.M. and the deadline was at 3:00 P.M.

_____ 4. The memo mentioned the employees' pension plan.

_____ 5. The inquiry mentioned that too documents were included.

_____ 6. In the latest newsletter there is an article about credit cards'.

_____ 7. Ryan, the last teller who was hired, is doing an excellent job.

_____ 8. Because of the good economy people are spending more money.

_____ 9. This represent a good time for the new computer support system installation throughout the company.

_____ 10. One of the tellers have gone to the office for the key.

_____ 11. The request was made over the telephone, and their was so much noise in the background that it was hard to hear.

_____ 12. The mail has arrived, hasn't it?

_____ 13. The customer service class is about customer satisfaction, however, the instructor will also discuss good communication with customers.

_____ 14. The next day the customer called to thank Luke for sending him the form.

_____ 15. What did Carol say after her good performance evaluation Margo?

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_____ 16. To solve the problem the following steps will be taken recounting the checks, reviewing the tape, and working in pairs.

_____ 17. When workers leave work unfinished, it makes a larger workload for their co-workers.

_____ 18. The statement was sent to the wrong address, because the customer did not send in a change of address.

_____ 19. The Community Banking Group has changed it's structure.

_____ 20. Most of the repairs in that department will take place while many of the employees are on vacation and there will be less general disturbance and work will be able to proceed according to the usual high standards.

_____ 21. The Fraud Department helps to keep bank losses at a minimum.

_____ 22. This customer has requested three stop payments this week.

_____ 23. Bank employees will assist older customers in learning to use their ATM cards.

_____ 24. The biggest batch of checks arrives after a holiday, so I never been absent then.

_____ 25. What are the new procedures for returning a check for nonsufficient funds.

PART II: Read the paragraph below. Organize the information in the space below. Then write it in memo form on the next page.

Four classes will be offered. This memo is about the new training classes that will be offered in the summer. Once the enrollment reaches 10, the class will be closed. The four classes include: Problem Solving and Decision Making, Computer Keyboarding Skills, Customer Service, and Mathematics. Today's date is May 30. Employees may sign up for classes by contracting me, Lars Larue, during the day at extension 214. The classes will take place in the Training Center. Registration begins June 6.

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PART III: Read the business letter below. Then answer the questions that follow.

7394 Martin Avenue
Naperville, Illinois 60540
April 6, 1995

Ms. Judith Robicheaux
Bank Manager
First Chicago Bank
2000 Washington Street
Naperville, Illinois 60540

Dear Ms. Robicheaux:

During my five years as a customer at your bank, I have had no complaint, until today. The problem is that my check order was not processed correctly, and I would like this problem rectified as soon as possible.

Recently I called the bank to say that I would be moving soon, so my new checks would have my new address on them. However, my new checks were sent to my old address and still have an incorrect address on them. Also, I have already been billed for the incorrect checks.

Can you offer me any assistance in straightening out this situation? I do not want to pay for unsatisfactory merchandise, and I need my new checks.

I appreciate the time you are taking to review my complaint. During the day I can be reached at 477-3321 from 9:00 A.M. to 5:00 P.M. Thank you for your assistance.

Yours Truly,

Paula Clarke

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On the lines below write the 6 parts of the business letter as a form.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. What kind of business letter is this, block or semi-block? _____

8. Is this a letter of inquiry or complaint? _____

9. Write the sentence that helped you to answer question 8. _____

_____

10. For what kind of response is the writer hoping? _____

PART IV: Write a resume as if you were applying for the job of CEO of First Chicago. Remember to include the appropriate headings and background necessary for such a job.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

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Course Overview:

Performance Appraisal Writing

Audience:	Supervisors who have responsibility for writing performance appraisals for employees
Goal:	To help identify what information is needed to write appraisals and write both self-appraisals and employee appraisals that include behavioral descriptions which are written in clear, concise, and professional language
Contact Hours:	8 - 24 hours
Schedule:	2 hours a session for 4 - 12 sessions
Competencies:	At the end of this course, participants will be able to:

1. Write performance objectives.
2. Write specific, concise behavior-based examples.
3. Write a self-appraisal.
4. Think of sources and kinds of data to gather.
5. Write constructive criticism.
6. Write employee performance review.

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COURSE CONTENT FOR PERFORMANCE APPRAISAL WRITING

Day/Topic	Activities	Materials
Day 1: Overview Performance Objectives	• Give course overview. • Discuss goals of appraisals. • Discuss characteristics of effective and ineffective appraisals. • Read and analyze First Chicago Performance Review Form. • Explain writing performance objectives. • Write performance objectives.	• 1:H1, 1:01 • EPA pp. 2-7, 25-27 • 1:H2, 1:02 • 1:H3, 4, 5, 6 • FCPR Blank • FCPR 1, 2
Day 2: Self-appraisal	• Discuss Do's and Don'ts for writing evaluations. • Practice writing specific, concise behavior-based examples. • Analyze samples of self-appraisals. • Learn ways to think of ideas for a self-appraisal. • Learn ways to generate ideas when writing.	• 2:H1, 2:O1 • 2:H2, 3, 4, 5, 6 • EPA: pp. 34-35 • FCPR 1
Day 3: Self-appraisal	• Write self -appraisal. • Revise self-appraisal.	• 3:H1
Day 4: Data gathering	• Teach rationale and approaches for gathering data. • Discuss common rating errors. • Practice thinking of sources and kinds of data.	• EPA pp. 36-39 • 4:H1, 2, 3 • 4: A1
Day 5: Performance review drafting	• Review Do's and Don'ts. • Write constructive criticism. • Draft an employee performance review.	• 5: H1 • FCPR 3 • EPA pp. 50-51
Day 6: Performance review writing	• Analyze samples of "key determinants." • Write key determinants. • Review Do's and Don'ts. • Write employee performance review. • Revise employee performance review. • Review course content.	• FCPR: 2-4 • EPA pp. 72-75

KEY: H = Handout, EPA = Effective Performance Appraisals, O = Overhead, FCPR = First Chicago Performance Review, A = Article

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FIRST CHICAGO CORPORATION

EFFECTIVE VS. INEFFECTIVE PERFORMANCE OBJECTIVES

An effective performance objective is clear, to the point, objective, tied closely to the actual job (not an outdated job description), and is written in such a way that it will be possible to gather data to support why the person did or did not meet the objective. Most performance objectives begin with action verbs.

Here is an example of an effective performance objective:

> *Met all deadlines on regular routes, securing approvals and meeting time frames (early or on time).*

Write why you think it's effective:

_____

_____

_____

Be careful to focus more on behaviors than outcomes otherwise interaction skills, planning, etc. are likely to be ignored. Don't just equate job performance with task performance because employees don't spend all their time on tasks. Although you want to write explicit standards and goals, you don't want to be confined by them. It is all too tempting to work to meet those standards and ignore everything that is not covered in the standard.

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I. Directions: **With a partner or small group, change the following ineffective performance objectives to effective ones. Briefly state what is ineffective about the original objectives.**

Examples:

Ineffective	Effective	Analysis
• Is nice to be around.	Demonstrates respect and consideration for others.	*Too subjective. What's considered " nice to be around?"*
• Completes assignments quickly.	Sends copies of statements within 24 hours of the claims ID date.	*Too vague. How quickly? Which assignments?*

Now you try...

Ineffective Objectives	Effective Objectives	Analysis
a) Does a good job with requirements.		
b) Interacts well with customers.		
c) Every morning, at 8:00 am, calls the messenger unit (999-9999) and makes sure that all items have been delivered to all the various departments at the times they were supposed to be delivered and to the proper locations. Calls back at the end of the day to check again. Fills out all the proper paperwork if there's a problem.		

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Course Overview:

Reading Outlines for Success

Audience:	Remittance clerks who have responsibility for processing mail sent to lockboxes
Goal:	To reduce the number of outline-relate errors in processing checks
Contact Hours:	8 hours
Schedule:	2 hours a session for 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. Scan for specific information such as lockboxes, names, and invoice numbers.
2. Sequence numbers in ascending numerical order.
3. Sort envelopes according to written procedures.
4. Define key terms on workplace documents.
5. Read an outline in order to identify acceptable and unacceptable payees.
6. Read outline instructions.

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Course Outline:
READING OUTLINES for SUCCESS

Lesson Component	Day 1	Day 2	Day 3	Day 4
	Worksheet: Introduction PRE-ASSESSMENT			
Scanning	***Worksheets:*** Scan 5-7 digit lockbox numbers. ***Activity:*** Scan envelopes.	***Worksheet:*** Sequence no's ***Activity:*** Sort cards with numbers.	***Worksheet:*** Match money written in numbers & in words. ***Activity:*** Sort checks.	***Activity:*** Alphabetize envelopes according to procedures.
Document Overview: Key terms & definitions	***Worksheet:*** Outlines	***Worksheet:*** 24 hour time ***Worksheet:*** Outlines	***Worksheet:*** Checks	***Worksheet:*** Error claim
Acceptable payees	***Worksheet:*** Check payees.	***Worksheet:*** Check payees.	----------	----------
Outline instructions	***Worksheet:*** Work-up instructions.	***Worksheet:*** Grouping instructions.	***Worksheet:*** Processing & mailing.	----------
Complete outlines	----------	***Worksheet:*** Read an entire outline.	***Worksheet:*** Read an entire outline.	----------
				POST ASSESSMENT

Dark lines indicate priority competencies.

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Name: _____

ASSESSMENT: READING OUTLINES FOR SUCCESS

Part A: **Read outline 78256. Pull out any envelopes which should not be processed.**

Part B: **Using outline 78256, answer the following questions.**

1. What are four major sections for instructions?

   _____

   _____

   _____

   _____

2. Is the deadline time 5 PM, Chicago time? _____

3. When you are working up the material, what should you be verifying?

   _____

   _____

4. If you have 160 separate checks, how many batches will you have? _____

5. How many groups do you work the material into? _____

6. How would you group the following checks?

   a. a check with 7 digits, balanced from amount paid _____

   b. a check with 11 numbers, balanced from amount paid _____

   c. a check with 10 digits, no amount paid is listed _____

   d. a check that does not match the invoice _____

   e. multiple checks without an invoice _____

   f. multiple checks which do not match the invoice _____

   g. one check for multiple invoices _____

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7. How many days a week are the checks processed? _____

8. What is the last deposit time? _____

9. The materials must be mailed by 8:00. True False

10. In what order do you organize the material?

a. Check stub, remittance document, envelope, all other material

b. Remittance document, check stub, envelope, all other material

c. None of the above

11. How many deposit times are there in the morning? _____

12. What is different about the mailing on Monday?

_____

_____

13. How many afternoon deposit times are there? _____

14. What do you do with a check that the payor forgot to sign?

_____

_____

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PART C: **KITTY KAT PRODUCTS specified that the invoices should be organized in sequential order. Sequence the following invoice numbers in ascending (low to high) order.**

a. _____ 56789

b. _____ 57698

c. _____ 59867

d. _____ 56669

e. 1 550

f. _____ 55567

g. _____ 567899

h. _____ 6756

i. _____ 554

j. _____ 55576

k. _____ 57764

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PART D: **KITTY KAT PRODUCTS specified that the envelopes should be sequenced in alphabetical order. Read KITTY KAT's special instructions and sequence the names below in alphabetical order according to KITTY KAT's instructions.**

SPECIAL INSTRUCTIONS for ALPHABETIZING ENVELOPES

1. Use the company or individual's name listed on the return address.
2. If it is an individual's name, alphabetize according to the last name.
3. If it is a company name, disregard "the" and "a", and alphabetize according to the second word.
4. Consider an initial as a word.

1.	_____	Ed McDonald
2.	_____	Mary Mackay
3.	_____	Megawarehouse for Cats
4.	_____	The Feline Store
5.	_____	Kitty's Specialty Shop
6.	_____	A Great Store for Pets
7.	_____	MCM Products
8.	_____	Mabel Miller Co.
9.	_____	Feline Products - Everything For Your Cat!
10.	_____	ABC Discount Market
11.	1	AB Cats

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PART E: **Review the following list of payees for KITTY KAT PRODUCTS. Check if the payees are acceptable or if you are unsure.**

NOTE: "Unsure" means that you must verify some information, check other documents, or ask a team leader.

Payee	Acceptable	Unsure
1. Kitty Care		
2. Linda Mrowicki		
3. Buckley		
4. Kitty Cat Products		
5. Kitty Kat Kare		
6. KK Products		
7. K. Mrowicki		
8. Kitty Cat Care Products		
9. Buckley Products		
10. Kitty Production		

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24 FIRST OUTLINE 2/07/95 14:44:0

BOX NO. 78256 PAGE
COMPANY TITLE: KITTY KAT PRODUCTS, INC. DDA: 527742
SITE - ID: L MODULE NUMBER:5

MAX BATCH SIZE	75	EVENT TYPE	DEADLINE
TIME			
		MAI	17:00 PT

WORKUP: WORKUP IN TWO PILES
OPEN MATERIAL FLAT
IF THE CHECK AMOUNT EQUALS TO THE INVOICE AMOUNT, CIRCLE THE INVOICE AMOUNT.

.

IF THE CHECK AMOUNT DOES NOT EQUAL TO THE INVOICE AMOUNT, WRITE THE CHECK AMOUNT ON THE INVOICE AND CIRCLE.

.

PROCESS ALL CHECKS RECEIVED IN A COMPANY PACK. ALL COMPANY PACK CHECKS SHOULD BE PROCESSED IN A SEPARATE BATCH.

.

PAPERCLIP MATERIAL TO ENVELOPE IN THE FOLLOWING ORDER:

1. INVOICE/LOCKBOX REMITTANCE DOCUMENT
2. CHECK STUB
3. ENVELOPE
4. ALL OTHER MATERIAL

GROUPS: WORK UP INTO 4 GROUPS

.

VALID INVOICE NUMBERS MUST BE 10 DIGITS OR 11 DIGITS

.

NOTE : WHEN MULTIPLE INVOICE NUMBERS ARE RECEIVED W/ ONE CHECK & NO BREAKDOWN OF INVOICE AMT PROCESS INTO GROUP 4.

.

GROUP 1 BALANCED FROM "AMOUNT PAID" CHECKS(S) WITH 10 OR 11 DIGIT INVOICE NUMBERS ON THE INVOICE, CHECK STUB, OR FACE OF THE CHECK THAT BALANCE.

.

GROUP 2 BALANCED FORM "AMOUNT PAID" CHECKS(S) WITH 9 OR LESS DIGIT INVOICE NUMBERS.

.

GROUP 3 ALL UNBALANCED ITEMS REGARDLESS OF THE INVOICE LENGTH.
ALL ITEMS THAT ARE REC'D. WITH NO "AMOUNT PAID" LISTED.

.

GROUP 4 MULTIPLE INVOICE & MULTIPLE CHECKS WHICH DO NOT MATCH OR ITEMS WITH NO INVOICE INFO.

NOTE: *This is not an actual outline. It was developed solely for the purpose of this training course.*

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FIRST OUTLINE 2/07/95 14:44:09

BOX NO. 78256 PAGE
COMPANY TITLE: KITTY KAT PRODUCTS, INC. DDA: 52774
SITE - ID:L MODULE NUMBER: 51

TAKE BATCHES TO DATA ENTRY BY 11:00 AM CST

PROCESSING INSTRUCTIONS

PROCESS DAYS.....MONDAY THRU SUNDAY
CONTRACTED DEPOSIT TIMES..... 1:00
4:00
8:30
9:30
16:00
SURVEY KEYING..... .NONE
PAID IN FULL.....RETURN ALL
FOREIGN ITEMS.....ENTER FOR COLLECTION
CANADIAN ITEMS.....PROCESS
UNSIGNED CHECKS.....PROCESS/USE SIGNATURE STAMP
CASH DEPOSITS.....RETURN

SPECIAL INSTRUCTIONS

ACCEPTABLES:
ACCEPT CHECKS ADDRESSED TO BX 9854 AND BX 43281
UNACCETABLES:

**********BEGIN ACCEPTABLE PAYEES**********

BUCKLEY PRODUCTS
FELINE, INC.
KITTY CARE
KITTY CAT CARE
KITTY KAT PRODUCTS
KITTY PRODUCTS
LINDA MROWICKI
MEOW SPECIALTIES

**********END ACCEPTABLE PAYEES**********

DATA TRANSMISSION
TRANS WINDOW: 16:00 - 18:00 CST
TROUBLE NO: 1-518-325-9368
COMPUTER ROOM: 1-518-325-4101

MAILING INSTRUCTIONS
MESSENGER WILL PICK UP PACKAGE AT 6:00AM
PREVIOUS DAYS WORK

ALL GROUP 1 ITEMS ARE TO BE SORTED IN ASCENDING

NOTE: *This is not an actual outline. It was developed solely for the purpose of this training course.*

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BOX NO. 78256 PAGE
COMPANY TITLE: KITTY KAT PRODUCTS, INC. DDA: 52774
SITE - ID:L MODULE NUMBER: 51

NUMERICAL ORDER BY THE FIRST FOUR DIGITS OF THE INVOICE NUMBER, THE DETAIL LISTINGS ARE TO BE INCLUDED IN THE PACKAGE BUT WILL NOT BE MATCHED TO THE WORK.

INCLUDE COMPUTER PRINTOUT IN THE PACKAGE
NOTE: SATURDAY'S DEPOSIT SHOULD BE SORTED SEPARATELY FROM MONDAY'S

MEDIUM: COMPANY PICKUP

MAILOUT ADDRESS

KITTY CAT PRODUCTS
ATTN: LINDA MROWICKI
1 N. MICHIGAN - 20TH FLOOR

CHICAGO IL ZIP CODE 60606-0000

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Course Overview:

Charts & Tables

Audience:	Corporate Mail Center clerks
Goal:	To improve skills in interpreting data in chart and table formats
Contact Hours:	6 hours
Schedule:	2 hours a session for 3 sessions
Competencies:	At the end of this course, participants will be able to:

1. Read vertical, horizontal, and multiple bar charts.
2. Construct a bar chart.
3. Read a line chart.
4. Read a circle chart.
5. Construct a circle chart.
6. Read a table.
7. Construct a table.

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FIRST CHICAGO CORPORATION
MAIL DISTRIBUTION

Charts and Graphs

Day	Competency	Activity
Day 1	• Pretest • Definition of Bar Charts • Kinds of Bar Charts (Horizontal, Vertical, Multiple, 3-D, simple, complex) • Bar Charts Construction	(Students will take a Pre-Assessment, construct graphs and tables over the course of three days, and take a Post-Assessment.)
Day 2	• Definition of Line Charts • Definition of Pie Charts • Kinds of Line Charts (Ones with standards) • Kinds of Pie Charts • Line and Pie Chart construction	
Day 3	• Definition of a Table • Kinds of Tables • Construction of a Table • Review • Post Assessment	

Course Times: Aug. 15, 17, & 22 @ 2 hrs. per

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MAIL DISTRIBUTION SERVICES ASSESSMENT

Directions: Read the attached charts and graphs and answer the questions.

A. PERCENTAGE OF ITEMS PRESORTED

1. What time period does this chart cover? _____

2. If there are 100 items of outgoing mail, how many should be presorted according to the goal? _____

3. If there are 200 items, what is the minimum number that should be presorted? _____

4. How many times did the department meet the goal? _____

5. How many times did the department meet the minimum acceptable performance? _____

6. What is the average percent of presorted items for the entire period? _____

B. TOTAL PRODUCTS/SERVICES INTRODUCED

7. What topic is this chart about? _____

8. How many months are shown on this chart? _____

9. How many new products were introduced in February? _____

C. LATE COPY JOBS

10. What is the total number of copy jobs shown in this chart? _____

11. What does the 2.1% represent? _____

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D. PRODUCTS/SERVICES

12. How many products and services were new in April? _____

13. If you work at 525 W. Monroe, where do you go to get a laptop computer? _____

14. How many different products are sold to employees at Admin. Service Central? _____

15. In which category is the largest number of products or services available at Admin. Service Central? _____

E. OUTGOING MAIL

16. What two types of information are represented by the two kinds of bars?

_____

_____

17. Which month had the lowest S & B Cost per Item? _____

18. Which month had the lowest Total Cost? _____

19. Which has the greatest variation from month to month - the S & B Cost per Item or the Total Exp. Cost per Item?

_____

20. What conclusion can you make about the relationship between the S & B Cost per Item and the Total Exp. Cost per Item?

_____

_____

_____

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Course Overview:

Math for Check Filing

Audience:	Disbursement Services clerks who have responsibility for filing checks
Goal:	To improve accuracy and speed in adding, subtracting, and filing by account number
Contact Hours:	6 hours
Schedule:	2 hours a session for 3 sessions
Competencies:	At the end of this course, participants will be able to:

1. Add basic facts with accuracy and speed.
2. Add whole numbers to millions.
3. Subtract basic facts with accuracy and speed.
4. Subtract whole numbers to millions.
5. File by account number with accuracy and speed.
6. List things to monitor when filing checks.

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MATH FOR CHECK FILING

At the end of this six-hour course, participants will be able to:

- Add basic facts with accuracy and speed
- Add whole numbers to millions
- Subtract basic facts with accuracy and speed
- Subtract whole numbers to millions
- File by account number with accuracy and speed
- List things to monitor when filing checks

Day 1

- Discuss purpose and administer - Pre-test
- Time completion of worksheet - Add basic facts
- Discuss tips to increase accuracy when adding
- Assign worksheet - Add whole numbers
- Begin list - Things to monitor when filing checks
- Time completion of filing checks by account number

Day 2

- Review as necessary
- Time completion of worksheet - Subtract basic facts
- Discuss tips to increase accuracy when subtracting
- Assign worksheet - Subtract whole numbers
- Continue list - Things to monitor when filing checks
- Time completion of filing checks by account number

Day 3

- Review as necessary
- Discuss tips to increase accuracy when filing
- Assign worksheet - Filing by account number
- Complete list - Things to monitor when filing checks
- Time completion of filing checks by account number
- Administer - Post-test

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MATH FOR CHECK FILING: Post-test

Directions: Add.

1) 376
+ 457

2) 495
+ 229

3) 1068
+ 1369

4) 2576
+ 598

5) 20,148
+ 39,898

6) 13,456
+ 9,889

7) 657,102
+ 367,788

8) 104,532
+ 6,486

9) 1,578,905
+ 2,247,963

10) 1,023,497
+ 573,413

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Directions: Subtract.

11) 962
- 79

12) 843
- 269

13) 5761
- 913

14) 6040
- 2732

15) 95,030
- 25,954

16) 81,234
- 32,889

17) 729,856
- 240,989

18) 510,200
- 249,638

19) 1,134,079
- 175,789

20) 4,356,100
- 1,678,518

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TRAY	ACCOUNT NUMBERS
A	09-67666 to 09-67677
B	09- 67678 to 09-67766
C	09-67767 to 09-67786
D	09-67787 to 09-67876
E	09-67877 to 09-67888

Directions: Circle A - E to show which tray you would file these account numbers into.

ACCOUNT NUMBER	TRAY
21) 09-67788	A B C D E
22) 09-67687	A B C D E
23) 09-67776	A B C D E
24) 09-67668	A B C D E
25) 09-67878	A B C D E
26) 09-67676	A B C D E
27) 09-67866	A B C D E
28) 09-67886	A B C D E
29) 09-67867	A B C D E
30) 09-67686	A B C D E

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Course Overview:

ATM Balancing

Audience:	ATM clerks who have responsibility for opening and balancing ATM envelopes
Goal:	To enhance skills in using the 10-key calculator to balance ATM envelopes
Contact Hours:	6 hours
Schedule:	2 hours a session for 3 sessions
Competencies:	At the end of this course, participants will be able to:

1. Verify amounts.
2. Add on a calculator with accuracy and speed.
3. Subtract on a calculator with accuracy and speed.
4. Identify parts of a check.
5. Identify acceptable and unacceptable checks.
6. Sort acceptable and unacceptable checks.
7. Balance ATM envelopes with accuracy and speed.
8. Identify acceptable foreign items.
9. Discuss things to monitor when balancing ATM envelopes.

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ATM BALANCING COURSE

Activity	Materials/ Equipment	Time
Day 1		
Introduction		20 min.
Pre-test		20 min.
Verify amounts	Timer	15 min.
Practice adding	Calculators	15 min.
Practice subtracting	Calculators	15 min.
Practice adding and subtracting	Calculators	30 min.
Intake form		5 min.
Day 2		
Review pre-test		10 min.
Identify elements of a check		30 min.
Identify acceptable & unacceptable checks		15 min.
Sort acceptable & unacceptable checks (2 times)	Checks	20 min.
Balance ATM envelopes (3 times, last time timed)	Timer, calculators & ATM envelopes	45 min.
Day 3		
Identify acceptable foreign items		25 min.
Brainstorm things to monitor when balancing ATM envelopes		15 min.
Balance ATM envelopes (3 times, last time timed)	Timer, calculators & ATM envelopes	45 min.
Post-test		20 min.
Evaluations & certificates		15 min.

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POST-TEST:ATM Balancing

I. Verify amounts (10 points)

Directions: Compare the written amounts to the numeric amounts. Circle S if they are the same or D if they are different.

1)	Nine hundred nineteen and 00/100 dollars	$919.00	S	D
2)	Nine hundred ninety and 90/100 dollars	$909.90	S	D
3)	One thousand, nine hundred ninety and 09/100 dollars	$1,990.09	S	D
4)	One thousand, one hundred ninety and 00/100 dollars	$1,190.99	S	D
5)	One thousand, nine and 19/100 dollars	$1,009.19	S	D
6)	One thousand, ninety and 09/100 dollars	$1,090.09	S	D
7)	One thousand, nine and 00/100 dollars	$1,900.00	S	D
8)	One thousand, one hundred nine and 19/100 dollars	$1,109.19	S	D
9)	One thousand, ninety and 90/100 dollars	$1,099.90	S	D
10)	One thousand, ninety and 99/100 dollars	$1,019.99	S	D

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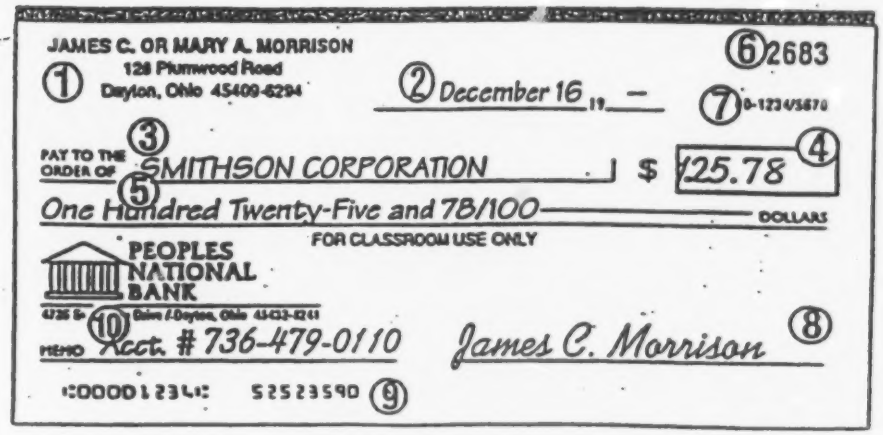
JAMES C. OR MARY A. MORRISON
128 Plumwood Road
Dayton, Ohio 45409-6294
(1)
(6) 2683
(2) December 16 19 –
(7) 0-123/5870
PAY TO THE ORDER OF (3) SMITHSON CORPORATION
$ 125.78 (4)
One Hundred Twenty-Five and 78/100 DOLLARS
(5)
FOR CLASSROOM USE ONLY
PEOPLES NATIONAL BANK
4726 Dayton/Dayton, Ohio 45423-4241
(10)
MEMO Acct. # 736-479-0110
James C. Morrison (8)
:00001234: 525235900 (9)

II. Identify elements of a check (10 points)

Directions: Read the list below. Write the correct numbers next to the elements of the check.

11) _____ Bank information field

12) _____ Date of check

13) _____ Check number

14) _____ Maker

15) _____ Authorized signature

16) _____ Legal amount

17) _____ Numeric amount

18) _____ MICR (Magnetic Ink Character Recognition) line

19) _____ Payee

20) _____ Memo

BEST COPY AVAILABLE

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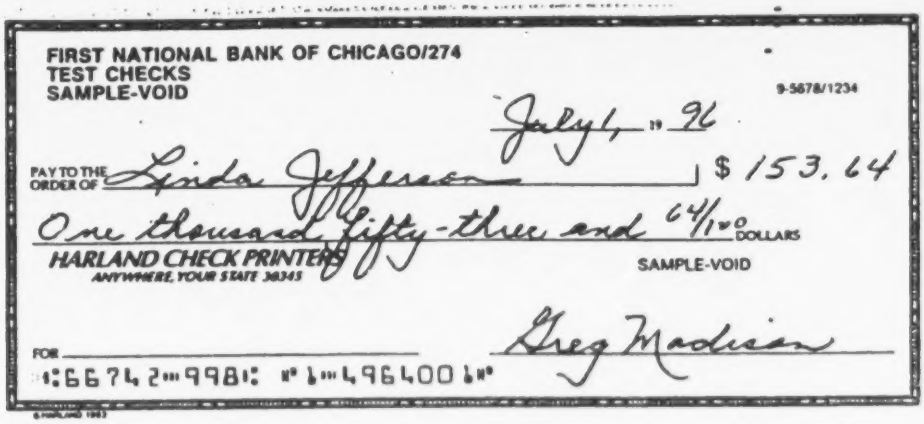
III. Identify acceptable and unacceptable checks (10 points)

Directions: Decide if these checks are acceptable for processing. Circle YES or NO. If your answer is NO, explain why the check is not acceptable for processing.


FIRST NATIONAL BANK OF CHICAGO/274
TEST CHECKS
SAMPLE-VOID

9-5678/1234

July 1, 19 96

PAY TO THE ORDER OF Linda Jefferson $ 153.64

One thousand fifty-three and 64/100 DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 30345

SAMPLE-VOID

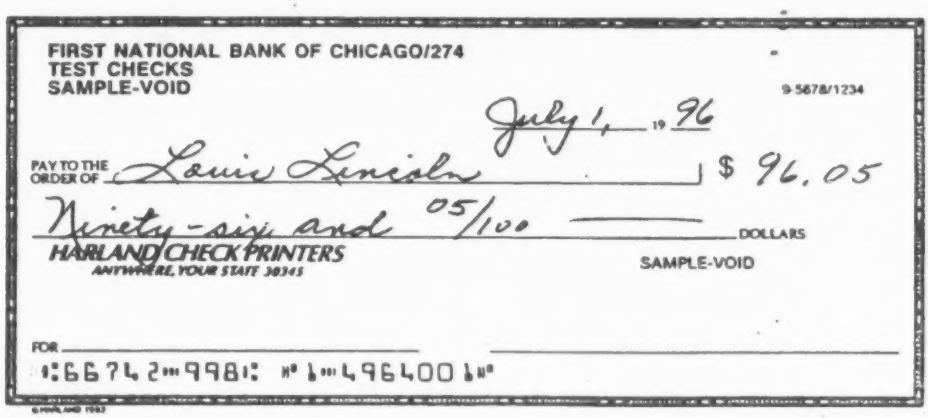
FOR _____ Greg Madison

⑆66742⑆9981⑆ ⑈1⑈496400⑆⑈

21) Is this check acceptable for processing? YES NO

If NO, why isn't it acceptable for processing? _____

_____


FIRST NATIONAL BANK OF CHICAGO/274
TEST CHECKS
SAMPLE-VOID

9-5678/1234

July 1, 19 96

PAY TO THE ORDER OF Louis Lincoln $ 96.05

Ninety-six and 05/100 DOLLARS

HARLAND CHECK PRINTERS
ANYWHERE, YOUR STATE 30345

SAMPLE-VOID

FOR _____

⑆66742⑆9981⑆ ⑈1⑈496400⑆⑈

22) Is this check acceptable for processing? YES NO

If NO, why isn't it acceptable for processing? _____

_____

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IV. Balance ATM envelopes (10points)

Directions: Solve the problems. Circle A, B, or C. If you circle A or B, write the amount to be debited or credited.

23) You have $19.00 cash and checks in the amounts of $63.55 and $57.66 from an ATM deposit envelope. The deposit line on the envelope shows $141.21. What should you do?

A) Complete a blue adjustment ticket showing amount to be debited _____

B) Complete a blue adjustment ticket showing amount to be credited _____

C) Do not complete a blue adjustment ticket; the contents of the envelope and the deposit line balance..

24) You have checks in the amounts of $2568.99, $389.77, and $44.37 from an ATM deposit envelope. The deposit line on the envelope shows $2993.13. What should you do?

A) Complete a blue adjustment ticket showing amount to be debited _____

B) Complete a blue adjustment ticket showing amount to be credited _____

C) Do not complete a blue adjustment ticket; the contents of the envelope and the deposit line balance..

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V. Foreign items (5 points)

Directions: Decide if the check is acceptable for processing. Circle YES or NO. Explain why the check is or is not acceptable for processing.

You have a check drawn on a bank in Canada. It is not payable in U.S. dollars. The amount of the check is $500.00.

25) Is this check acceptable for processing? YES NO

Why is or isn't it acceptable for processing? _____

_____

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Course Overview:

Place Value

Audience:	New hires in Central Operations
Goal:	To review place value, reading large numbers, and writing numbers as written amounts
Contact Hours:	1 hour
Schedule:	1 hour a session for 1 session
Competencies:	At the end of this course, participants will be able to: 1. Read large numbers quickly. 2. Write numbers as written amounts.

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WRITTEN NUMBERS: Write numbers as written amounts

When you write numbers as written amounts:

- Write numbers from 21 to 99 with a hyphen or a dash (-) between the tens and the ones place.

  Examples:

Number	Written amount
36	thirty-six
48,000	forty-eight thousand

- Put a comma after the words "billion," "million," and "thousand."

  Examples:

Number	Written amount
1,045	one thousand, forty-five
2,461,802	two million, four hundred sixty-one thousand, eight hundred two
3,254,140,126	three billion, two hundred fifty-four million, one hundred forty thousand, one hundred twenty-six

Do not use the word "and" in whole numbers.

Examples:

Number	Correct	Incorrect
257	two hundred fifty-seven	two hundred **and** fifty-seven
1,900	one thousand nine hundred	one thousand **and** nine hundred

When you write dollars and cents as written amounts:

- Write cents as a fraction of a dollar. The denominator (bottom number) is always 100 because there are 100 cents in a dollar.

  Examples: Write 25 cents as 25/100 dollars.
  Write no cents as 00/100 dollars.

- Use the word "and" for the decimal point.

  Examples:

Number	Written amount
$983.75	nine hundred eighty-three **and** 75/100 dollars
$1,349.00	one thousand, three hundred forty-nine **and** 00/100 dollars

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Directions: Decide if the written amounts are correct. Circle C for correct or I for incorrect.

	Number	Written amount	Correct or Incorrect
1)	81	eighty-one	C I
2)	5,379	five thousand three hundred seventy-nine	C I
3)	1,234,567	one million, and two hundred thirty-four thousand, five hundred sixty-seven	C I
4)	92,000	ninety two thousand	C I
5)	4,421	four thousand, four hundred twenty-one	C I
6)	2,304,260	two million, three hundred four thousand, two hundred sixty	C I
7)	789	seven hundred and eighty-nine	C I
8)	1,986,375,284	one billion nine hundred eighty-six million three hundred seventy-five thousand two hundred eighty-four	C I
9)	37,000,000	thirty-seven million	C I
10)	29,840	twenty-nine thousand, eight hundred forty	C I
11)	$200.09	two hundred and 09/100 dollars	C I
12)	$1,766.66	one thousand, seven hundred sixty-six 66/100 dollars	C I
13)	$6,543.00	six thousand, five hundred forty-three and 00/100 dollars	C I
14)	$572.00	five hundred seventy-two and 00/00 dollars	C I

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Directions: Fill in the written amount for each number.

	Number	Written amount
1)	$93.81	
2)	$482.93	
3)	$2,618.00	
4)	$25,000.75	
5)	248,853	
6)	7,029,381	
7)	38,410,314	
8)	492,508,668	
9)	2,769,872,034	
10)	5,550,675,385	

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Course Overview:

What's Your Message?

Audience:	Corporate Mail Center clerks
Goal:	To enhance skills in teamwork, telephone techniques, mail investigation, and sorting
Contact Hours:	10.5 hours
Schedule:	1.5 hours a session for 7 sessions
Competencies:	At the end of this course, participants will be able to:

1. Scan suite numbers.
2. Sort by block number.
3. Identify problems when sorting.
4. Define team and teamwork.
5. Identify working styles.
6. Define customer and good customer service.
7. Establish a telephone greeting.
8. Determine importance of telephone skills and tone of voice.
9. Ask for information on the telephone.
10. Respond to callers' inquiries.
11. Order deadlines for mail.
12. Direct mail to appropriate person.

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What's your message?

Day	Topic	Activity
1	PRE-COURSE SELF-ASSESSMENT SORT: Scan suite numbers TEAMWORK: Define team Define teamwork TELEPHONE: Establish greeting	Individual verbal Individual verbal Individual verbal Individual verbal Individual verbal
2	SORT: Sort by block number TEAMWORK: Identify working styles TELEPHONE: Determine importance of telephone skills MAIL: Order daily tasks Order deadlines for mail	Individual verbal Class verbal Individual verbal Individual verbal Individual verbal
3	SORT: Sort by block number TEAMWORK: Define roles within a team TELEPHONE: Determine importance of tone of voice Develop your tele-tone MAIL: Determine alternative spelling of names TEAMWORK SELF-EVALUATION	Individual verbal Team verbal Team verbal Individual verbal Team verbal Individual verbal
4	SORT: Identify problems when sorting TEAMWORK: Activity Improve cooperation among co-workers TELEPHONE: Ask for information MAIL: Direct mail to appropriate person TEAMWORK SELF-EVALUATION	Individual verbal Individual kinesthetic Team verbal Team verbal Team verbal Individual verbal
5	SORT: Sort exercise 1 TEAMWORK: Define positive attitude TELEPHONE: Respond to callers' inquiries TEAMWORK SELF-EVALUATION	Individual kinesthetic Team verbal Team verbal Individual verbal
6	SORT: Sort exercise 2 TEAMWORK: Define customer Define good customer service TELEPHONE: Practice telephone skills TEAMWORK SELF-EVALUATION POST-COURSE SELF-ASSESSMENT	Individual kinesthetic Team verbal Individual verbal Individual kinesthetic Individual verbal Individual verbal

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SORT: Sort by block number

Block	Suite Numbers
1	0002 - 0245
2	0246 - 0401
3	0402 - 0591
4	0592 - 0999

Directions: Into which block above would you sort these suite numbers? Circle 1 - 4.

	Suite Number	Block			
1)	0245	1	2	3	4
2)	0702	1	2	3	4
3)	0529	1	2	3	4
4)	0146	1	2	3	4
5)	0425	1	2	3	4
6)	0020	1	2	3	4
7)	0401	1	2	3	4
8)	0246	1	2	3	4
9)	0524	1	2	3	4
10)	0226	1	2	3	4
11)	0592	1	2	3	4
12)	0691	1	2	3	4
13)	0410	1	2	3	4
14)	0345	1	2	3	4

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MAIL: Determine alternative spellings of names

Directions: Work in a team. If you were unable to locate the names as spelled below, what alternative spellings could you try?

NAME	ALTERNATIVE SPELLINGS
Mc Donald	
Smith	
Davidson	
Brown	
Pulaski	
Colby	
Harris	
Stevens	
Barry	
Bergen	
Cain	
Olivi	

Can you think of other examples?

Is your name ever misspelled? What are some of the misspellings?

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Course Overview:

Unlocking Lockbox

Audience:	New hires in Remittance Banking
Goal:	To provide an overview of work in the Lockbox department
Contact Hours:	8 hours
Schedule:	2.5 – 3 hours a session for 3 sessions
Competencies:	At the end of this course, participants will be able to:

1. Scan envelopes for correct Lockbox number.
2. Identify parts of a check.
3. Identify incorrect or missing information on checks.
4. Compare two amounts on checks.
5. Identify parts of an outline.
6. Read an outline in order to identify acceptable and unacceptable payees.
7. Read an outline for specific information.
8. Do workup, stapling, and mailout.
9. Order the flow of work in the Lockbox department.
10. Convert 24-hour time to standard time.
11. Convert Julian date to calendar date.

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DAY 1 - TRAINERS' OUTLINE

Topic	Materials	Time	Notes
1. **Introduction:** • Instructor & participants • Lockbox Overview • Work Flow	Slides Page 1	30 mins.	8:30-9:00
2. **Pre-Assessment**	Assessments Envelopes	20 mins.	9:00-9:20
3. **Lockbox Scanning** • Scanning Ex • Discussion • Scanning Ex. 2 • Envelope Fan	page 2 page 3 Envelopes - 1 set	20 mins.	9:20 - 9:50
4. **"Chiquita" Check** • Check parts • Checking Checks • Place Value • 2 amounts	page 4 pages 5, 6, 7 pages 8 & 9 pages 10 & 11	45 mins.	9:50-10:35
Break			10:35-10:45
5. **Customer Outline** • Overview - parts • Reading	pages 12, 13, 14 page 15	30 mins.	10:30-11:15
6. **Workup Activity**	page 16 Fonovisa	15 mins.	11:15 - 11:30

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DAY 2 - TRAINERS' OUTLINE

Topic	Materials	Time	Notes
1. **Review:** • Work Flow • Outline Parts • 2 amount checks	Work Flow cards Outline Stick-Ups Check Set # 1	30 mins.	9:00-9:30
2. **Workup Activity** • Workup Independently • Introduction to stapling • Guided stapling	Warner Music page 17	30 mins.	9:30-10:00
3. **Acceptable Payees**	pages 18 & 19	20 mins.	10:00-10:20
Break			10:20-10:35
4. **Variations in Workup**	page 20	15 mins.	10:35 - 10:50
5. **Workup Activity** • Workup & Stapling Independently • Introduction to Advice • Guided stapling	Syntace page 21 & 22 page 23	30 mins.	10:50-11:20
6. **Variations in Mailout**	page 24	10 mins.	11:20-11:30

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DAY 3 - TRAINERS' OUTLINE

Topic	Materials	Time	Notes
1. Review: • Outline Parts • Check parts • 2 amount checks	Outline Stick-Ups Page 25 Check Set # 2	15 mins.	9:00-9:15
2. **Workup Activity** • Workup, Stapling, & Mailout Independent	Computerlife	20 mins.	9:15-10:05
4. **Time & Dates** • 24 hour clock • Julian dates	pages 26-28 page 29	20 mins.	10:05-10:25
Break		10 mins.	10:25-10:35
5. **Outine with Acceptable Payees**	page 30	10 mins.	10:35-10:45
6. **Workup Activity**	HED Cycling Products	15 mins.	10:45-11:00
7. **Post Assessment**	Assessments	20 mins.	11:00-11:20
8. **Certificates**		10 mins.	11:20 - 11:30

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OVERVIEW: Outlines

Directions: **The major headings of an outline are listed below. Find and highlight the section headings on Outlines 73276 and 70164. Then briefly describe what information is found in each section.**

BOX. NO. _____

DDA _____

MAX. BATCH SIZE _____

DEADLINE TIME _____

WORKUP _____

STAPLING _____

PROCESSING INSTRUCTIONS _____

_____

SPECIAL INSTRUCTIONS _____

_____

ACCEPTABLE PAYEES _____

_____

MAILING INSTRUCTIONS _____

_____

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Course Overview:

How Are We Performing?

Audience:	Employees in Central Operations
Goal:	To enhance skills in participating in the performance management process
Contact Hours:	4 – 8 hours
Schedule:	1.5 – 4 hours a session for 1 – 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. List standards and objectives for their jobs.
2. Select descriptions of core competencies that apply to their jobs.
3. Write job-specific competencies for their jobs.
4. Write accomplishments for their jobs.
5. Evaluate sample performance compared to standards.
6. Evaluate sample performance compared to core competencies.
7. Evaluate job-specific competencies.
8. Write employee comments about competencies.
9. Write employee summary comments.
10. Discuss interaction between manager and employee in feedback sessions.
11. Discuss things to include in a personal development plan.

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How Are We Performing?
SESSION 1

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Introduction	10 mins.	• Identify course content	• Mini-lecture
Self-assessment	10 mins.	• Self-assess skills	• Individual task
Overview	15 mins.	• Discuss old vs. new rating system. • Identify steps done at beginning, during and at end of performance period.	• Group discussion • Mini-lecture
Standards and Objectives	30 mins.	• Define standards and objectives. • Discuss well-written standards and objectives. • List standards and write objectives for your job.	• Mini-lecture • Pair work/Group discussion • Individual task/Group discussion
Core Competencies	30 mins.	• Define core competencies. • Discuss meaning of terms in descriptions of competencies. • Select descriptions that apply to your job.	• Mini-lecture • Group discussion • Individual task/Pair work
Job-Specific Competencies	15 mins.	• Define job-specific competencies. • Write job-specific competencies for your job.	• Mini-lecture • Individual task/Group discussion
Beginning of Perf. Period	10 mins.	• Fill in steps done at beginning of performance period.	• Individual task
Accomplishments	25 mins.	• Define accomplishments. • Discuss well-written accomplishments. • Write accomplishments for your job.	• Mini-lecture • Pair work/Group discussion • Brainstorming/ Mini-lecture
During Perf. Period	5 mins.	• Fill in steps done during performance period.	• Individual task

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How Are We Performing?
SESSION 2

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Warm-up	5 mins.	• Review	• Pair work
Performance Range	15 mins.	• Define performance range. • Discuss completed evaluation of accomplishments.	• Mini-lecture • Group discussion
Evaluation of Accomplish-ments	30 mins.	• Evaluate sample performance compared to standards.	• Case study
Evaluation of Core Competencies	30 mins.	• Discuss evaluation of core competencies. • Evaluate sample performance compared to core competencies.	• Group discussion • Case study
Evaluation of Job-Specific Competencies	5 mins.	• Evaluate job-specific competencies.	• Group discussion
Written Comments	50 mins.	• Define well-written comments. • Discuss well-written comments. • Improve comments that are not concrete or concise. • Correct grammatical/mechanical errors.	• Mini-lecture • Group discussion • Pair work/Group discussion • Pair work/Group discussion/mini-lecture
Comments on Competencies	15 mins.	• Discuss comments on competencies. • Write employee comments about competencies.	• Group discussion • Case study/Individual task/Pair work

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How Are We Performing?
SESSION 3

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Warm-up	5 mins.	• Review	• Pair work
Comments on Competencies	15-30 mins.	• Write employee comments about competencies.	• Case study/Individual task/Pair work
Summary Comments	30-40 mins.	• Discuss summary comments. • Write employee summary comments.	• Group discussion • Case study/Individual task/Pair work
Verbal Feedback	35-40 mins.	• Discuss interaction between manager and employee. • Role play interaction between manager and employee.	• Group discussion • Case study/Role-play
Personal Development Plan	10 mins.	• Define personal development plan. • Discuss things to include in personal development plan.	• Mini-lecture • Brainstorming
End of Perf. Period	10 mins.	• Fill in steps done at end of performance period.	• Individual task
Personal Timeline	5 mins.	• Identify months for performance management events.	• Individual task
Self-assessment	10 mins.	• Self-assess skills	• Individual task
Evaluations	15 mins.	• Complete Participant End-of-Course Evaluation forms	• Individual task

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Standards and Objectives

Directions: Circle S if the statement is a standard and O if it is an objective.

1.	Prepares 150 envelopes per hour.	S	O
2.	Keys 230 envelopes per hour.	S	O
3.	Sends copies of statements within 24 hours of claim date.	S	O
4.	Keys 1300 fields/hr.	S	O
5.	Maintains 750 unit files.	S	O
6.	Answers the telephone within 2 rings.	S	O
7.	Sorts 1000 items/hr.	S	O
8.	Averages an error rate of 1/370,000 for sorted items.	S	O

Directions: List standards for your job.

_____

_____

_____

_____

Directions: Write objectives for your job.

_____

_____

_____

_____

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Accomplishments

☑ Checklist for Accomplishments

- ☐ Does the statement compare the accomplishment to a standard or objective?
- ☐ Is the statement specific (dates, names, numbers, etc.)?
- ☐ Does the statement indicate the benefit to FCNBD?

Directions: Work with a partner. Use the checklist to evaluate the following statements. What would you improve? How would you rewrite the statements?

1. Keyed better than most people in the department.

_____

2. Took care of all "RUSH" document requests early.

_____

3. Worked overtime to fix a problem.

_____

4. Came up with a way to gather all necessary information from callers who are looking for a piece of mail.

_____

Directions: Write an accomplishment for what you did.

_____

_____

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Course Overview:

How Are They Performing?

Audience:	Supervisors and managers in Central Operations
Goal:	To enhance skills in participating in the performance management process
Contact Hours:	6 – 8 hours
Schedule:	1.5 – 2 hours a session for 3 – 4 sessions
Competencies:	At the end of this course, participants will be able to:

1. List standards and objectives for their jobs.
2. Select descriptions of core competencies that apply to their jobs.
3. Write job-specific competencies for their jobs.
4. Select descriptions of managerial/supervisory competencies that apply to their jobs.
5. Write accomplishments for their jobs.
6. Evaluate sample performance compared to standards.
7. Evaluate sample performance compared to core competencies.
8. Evaluate job-specific competencies.
9. Evaluate managerial/supervisory competencies.
10. Write employee comments about competencies.
11. Write employee summary comments.
12. Write comments about an employee.
13. Discuss interaction between manager and employee in feedback sessions.
14. Discuss conducting feedback session.
15. Discuss things to include in a personal development plan.

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How Are They Performing?

SESSION 1

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Introduction	10 mins.	• Identify course content	• Mini-lecture
Self-assessment	10 mins.	• Self-assess skills	• Individual task
Overview	10 mins.	• Discuss old vs. new rating system. • Identify steps done at beginning, during and at end of performance period.	• Group discussion • Mini-lecture
Standards and Objectives	30 mins.	• Define standards and objectives. • Discuss well-written standards and objectives. • List standards and write objectives for your job.	• Mini-lecture • Pair work/Group discussion • Individual task/Group discussion
Core Competencies	30 mins.	• Define core competencies. • Discuss meaning of terms in descriptions of competencies. • Select descriptions that apply to your job.	• Mini-lecture • Group discussion • Individual task/Pair work
Job-Specific Competencies	10 mins.	• Define job-specific competencies. • Write job-specific competencies for your job.	• Mini-lecture • Individual task/Group discussion
Managerial/ Supervisory Competencies	15 mins.	• Discuss meaning of terms in descriptions of competencies • Select descriptions that apply to your job	• Group discussion • Individual task/Pair work
Beginning of Perf. Period	5 mins.	• Fill in steps done at beginning of performance period.	• Individual task
Accomplishments	25 mins.	• Define accomplishments. • Discuss well-written accomplishments. • Write accomplishments for your job.	• Mini-lecture • Pair work/Group discussion • Brainstorming/ Mini-lecture
During Perf. Period	5 mins.	• Fill in steps done during performance period.	• Individual task

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How Are They Performing?

SESSION 2

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Warm-up	5 mins.	• Review	• Pair work
Performance Range	10 mins.	• Define performance range. • Discuss completed evaluation of accomplishments.	• Mini-lecture • Group discussion
Evaluation of Accomplish-ments	30 mins.	• Evaluate sample performance compared to standards.	• Case study
Evaluation of Core Competencies	30 mins.	• Discuss evaluation of core competencies. • Evaluate sample performance compared to core competencies.	• Group discussion • Case study
Evaluation of Job-Specific Competencies	5 mins.	• Evaluate job-specific competencies.	• Group discussion
Evaluation of Managerial/ Supervisory Competencies	10 mins.	• Evaluate managerial/supervisory competencies	• Group discussion
Written Comments	45 mins.	• Define well-written comments. • Discuss well-written comments. • Improve comments that are not concrete or concise. • Correct grammatical/mechanical errors.	• Mini-lecture • Group discussion • Pair work/Group discussion • Pair work/Group discussion/mini-lecture
Comments on Competencies	15 mins.	• Discuss comments on competencies. • Write employee comments about competencies.	• Group discussion • Case study/Individual task/Pair work

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How Are They Performing?
SESSION 3

TOPICS	TIME	OBJECTIVES	ACTIVITIES
Warm-up	5 mins.	• Review	• Pair work
Comments on Competencies	15-30 mins.	• Write employee comments about competencies.	• Case study/Individual task/Pair work
Summary Comments	20-30 mins.	• Discuss summary comments. • Write employee summary comments.	• Group discussion • Case study/Individual task/Pair work
Evaluating Employees	10 mins.	• Discuss evaluating employees. • Write comments for employee.	• Group discussion • Individual task
Verbal Feedback	20-25 mins.	• Discuss interaction between manager and employee. • Role play interaction between manager and employee.	• Group discussion • Case study/Role-play
Conducting Fedback Sessions	15 mins.	• Discuss conducting feedback sessions. • Role-play interaction between manager and employee	• Group discussion • Case study/Role-play
Personal Development Plan	10 mins.	• Define personal development plan. • Discuss things to include in personal development plan.	• Mini-lecture • Brainstorming
End of Perf. Period	10 mins.	• Fill in steps done at end of performance period.	• Individual task
Personal Timeline	5 mins.	• Identify months for performance management events.	• Individual task
Self-assessment	10 mins.	• Self-assess skills	• Individual task
Evaluations	15 mins.	• Complete Participant End-of-Course Evaluation forms	• Individual task

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Evaluating Employees

***TIPS* for evaluating employees:**

⇒ Review the standards or objectives for the job.

⇒ Review the employee's experience, training, job competencies, and past performance.

⇒ Evaluate job performance compared to standards or objectives and competencies, not on characteristics that do not apply to the job.

⇒ Note any areas that are "Outstanding" or "Need Development." Describe specific incidents.

Directions: Think of one of your employees. Write summary comments. Do not use the employee's real name.

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Conducting Feedback Sessions

***TIPS* for conducting feedback sessions:**

⇒ Discuss areas that are "Outstanding."

⇒ Discuss reasons for variations between the employee's and your evaluation.

⇒ Discuss areas that "Need Development" and plans for corrective action. Review the standards or objectives that apply with the employee.

⇒ Discuss personal development for the employee.

⇒ Summarize what you discussed.

⇒ Ask for final comments or questions from the employee.

⇒ Thank the employee for participating.

⇒ Review future plans.

***TIPS* for communicating with employees:**

Don't say:	**Do say:**
• How could you do that?	• Can you explain what caused the problem?
• Here's what you need to do.	• What do you suggest we do?
• This is the way we've always done it.	• We've always done it this way, but I'd like to hear your ideas for improvement.
• This is the way to do it.	• This is the best idea I could come up with. Do you have any ideas?

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Conducting Feedback Sessions

Directions: Act out the following role play and discuss the interaction between the manager and the employee.

Manager	Come on in Lee. Have a seat. Last month some ATM envelopes came through your hands with validation lines that weren't clear, and you didn't tell anyone. How could you be so careless?
Lee	Well, I...
Manager	And, you need to talk up more in team meetings.
Lee	OK.
Manager	I'm going to sign you up for a communication class. Anything else?
Lee	I guess not.

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